CAB Information Memorandum
FCRB Program #3: Electronic FCRB Files for Facilitators

Date Issued: January 9, 2017

Effective: January 9, 2017

Purpose: To streamline the most efficient method for electronically sharing FCRB case file documents with facilitators in order to:

- Enhance the security of confidential information;
- Fulfill contractual expectations of applicable individuals;
- Control the growth of materials taking up valuable office space;
- Reduce operating costs (supplies, postage, shredding, etc.);
- Reduce amount of staff time spent handling and managing paper files.

Process Overview: The following process is a work directive and employees are required to carry out the process steps as part of their work responsibilities.

1. All FCRB facilitators (contract, volunteer and staff facilitators) will access case file documents electronically through Google Drive. Hard copy files will no longer be provided to facilitators by Administrative Assistants (AA). There will be a cutoff date for this new process.

2. Administrative Assistants will use Google Drive to set up folders for each board scheduled in a given month.
    a. Only one month’s worth of files will be available at a given time for each board.
    b. After the board concludes for the month, the folder will be deleted.

3. Each board folder will contain the following:
    a. Copy of the most current agenda
    b. A folder for each child which contains case file documents arranged by date so the viewers can see the case chronologically and a late mail folder where any additional documents will be stored that come in prior to the review.

4. Files will be uploaded to the Board folders no later than three weeks prior to the review day. Administrative Assistants will share the folder with the facilitator through Google Drive.

5. Each facilitator will need a Gmail account to access the shared folder. Facilitators can create an account by going to Gmail.com – Create Account – set up your own username and password.

Procedural Steps for Administrative Assistants: A streamlined, consistent method for setting up the board folders and case file documents is critical for implementation of an e-file system. The process does not need to be the same across the board; however each AA needs to establish a consistent method so the facilitators and board members know what to expect each time they access the electronic files.

1. Organize the case file documents within each child's folder by date first. Examples:
   a. 2016 01 12 CPP (Johnson)
   b. 2016 01 03 Social History (Johnson)
   c. 2015 12 25 Adjudication Order (Johnson)
   d. 2015 11 15 Removal Order (Johnson)

   Date configuration can vary from AA to AA as long as whatever configuration an AA uses, they must be consistent with all files and the year must come first. If the year is not first and you use 2-8-16 or 2-8-2016 or 2-8-2015 – the documents will not sort in chronological order.

   Options for date configurations include:
   2016.0208
   2016-02-08
   2016.02.08
   2016 02 08
   20160208

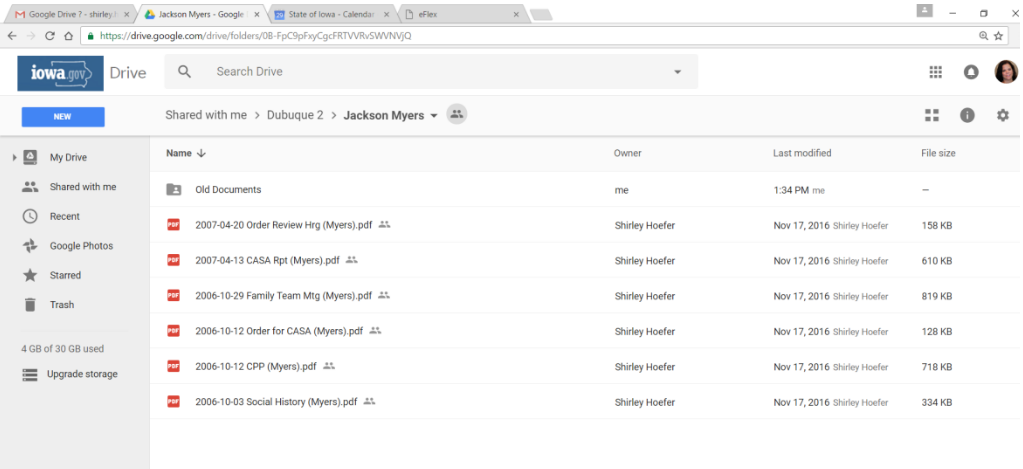
2. In Google Drive, create a folder for each board and include the month. Example: Dubuque 1 February
   Access Google Drive by opening the 9x9 grid in the upper right-hand corner. Then click on Drive. This will take you to My Drive where you will set up your board folders. Next to Name – right click anywhere and select New Folder. Name your folder with the board name with month.

3. Open the folder and upload the current agenda for the board. Right click, choose upload file. Browse to your computer, highlight the agenda to upload, select OK. The agenda will be uploaded to the Google Drive. Alternate method: Drag the agenda to Google Drive from your where it is saved on your computer.

4. Right click in the folder, choose upload folder. Browse to your computer, highlight the child's file you want to upload, select OK. The child's folder will be uploaded to the Google Drive. Repeat this step for each child on the agenda. Alternate method: Drag the folder to Google Drive from your where it is saved on your computer.

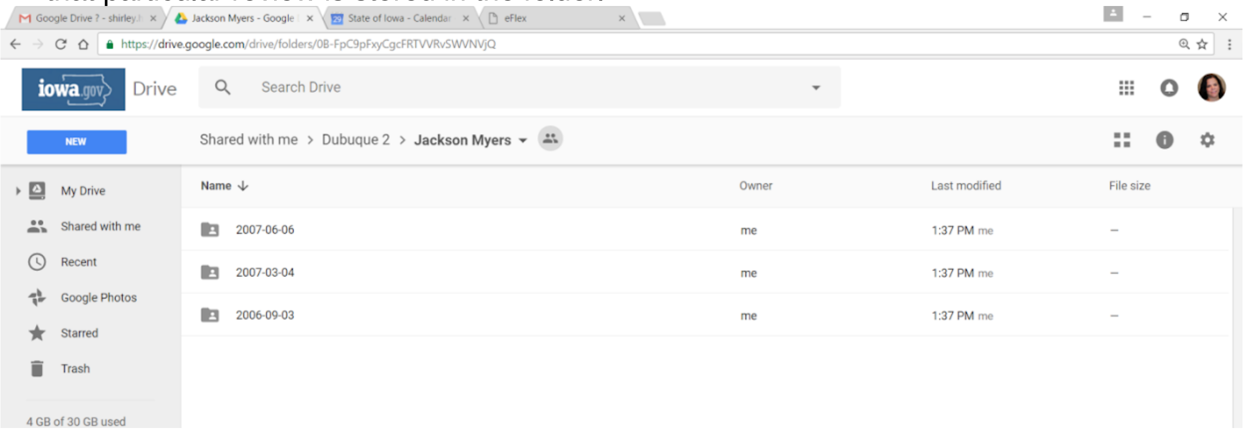
5. Setting up the case documents for each child. There is a variety of ways that AAs currently store documents for each child's case. Whichever method chosen by the AA needs to be consistent for all the boards from month to month.

   Examples included on the following page.
   Some options for setting up a child's file include:
   a. All documents received since the last review along with the last FCRB report are in the folder. All old documents are in a folder named Old Documents within the child's folder.


Google Drive ? - shirley
Jackson Myers - Google
State of Iowa - Calendar
eFlex
https://drive.google.com/drive/folders/0B-FpC9pFxyCgcFRTVVRvSWVNVjQ
iowa.gov
Drive
Search Drive
NEW
Shared with me > Dubuque 2 > Jackson Myers
My Drive
Shared with me
Recent
Google Photos
Starred
Trash
4 GB of 30 GB used
Upgrade storage

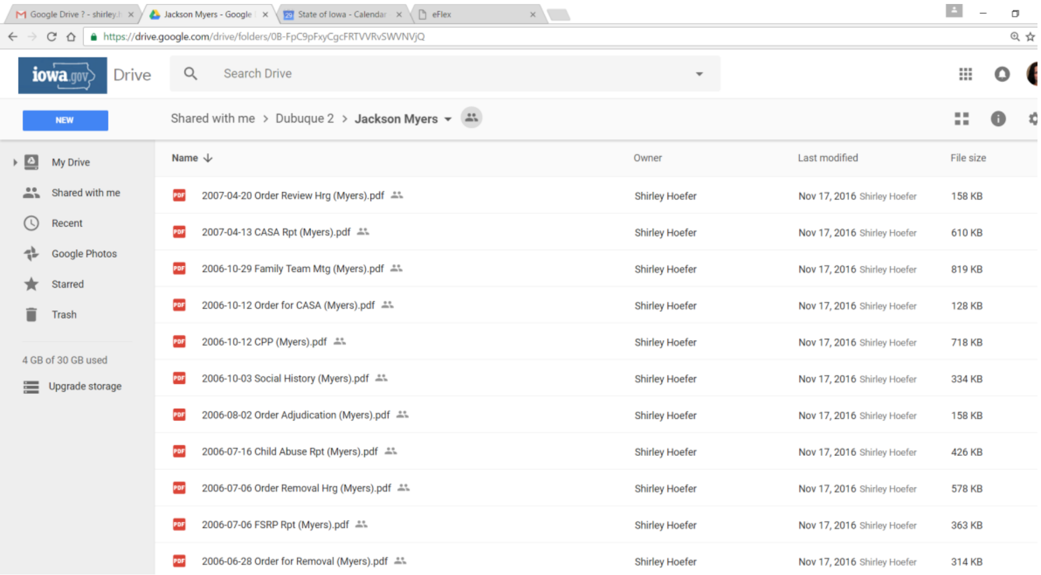
Name	Owner	Last modified	File size
Old Documents	me	1:34 PM me	–
2007-04-20 Order Review Hrg (Myers).pdf	Shirley Hoefer	Nov 17, 2016 Shirley Hoefer	158 KB
2007-04-13 CASA Rpt (Myers).pdf	Shirley Hoefer	Nov 17, 2016 Shirley Hoefer	610 KB
2006-10-29 Family Team Mtg (Myers).pdf	Shirley Hoefer	Nov 17, 2016 Shirley Hoefer	819 KB
2006-10-12 Order for CASA (Myers).pdf	Shirley Hoefer	Nov 17, 2016 Shirley Hoefer	128 KB
2006-10-12 CPP (Myers).pdf	Shirley Hoefer	Nov 17, 2016 Shirley Hoefer	718 KB
2006-10-03 Social History (Myers).pdf	Shirley Hoefer	Nov 17, 2016 Shirley Hoefer	334 KB

b. There is a folder for each Review Date within the child's folder and every document received for that particular review is stored in the folder.


Google Drive ? - shirley
Jackson Myers - Google
State of Iowa - Calendar
eFlex
https://drive.google.com/drive/folders/0B-FpC9pFxyCgcFRTVVRvSWVNVjQ
iowa.gov
Drive
Search Drive
NEW
Shared with me > Dubuque 2 > Jackson Myers
My Drive
Shared with me
Recent
Google Photos
Starred
Trash
4 GB of 30 GB used

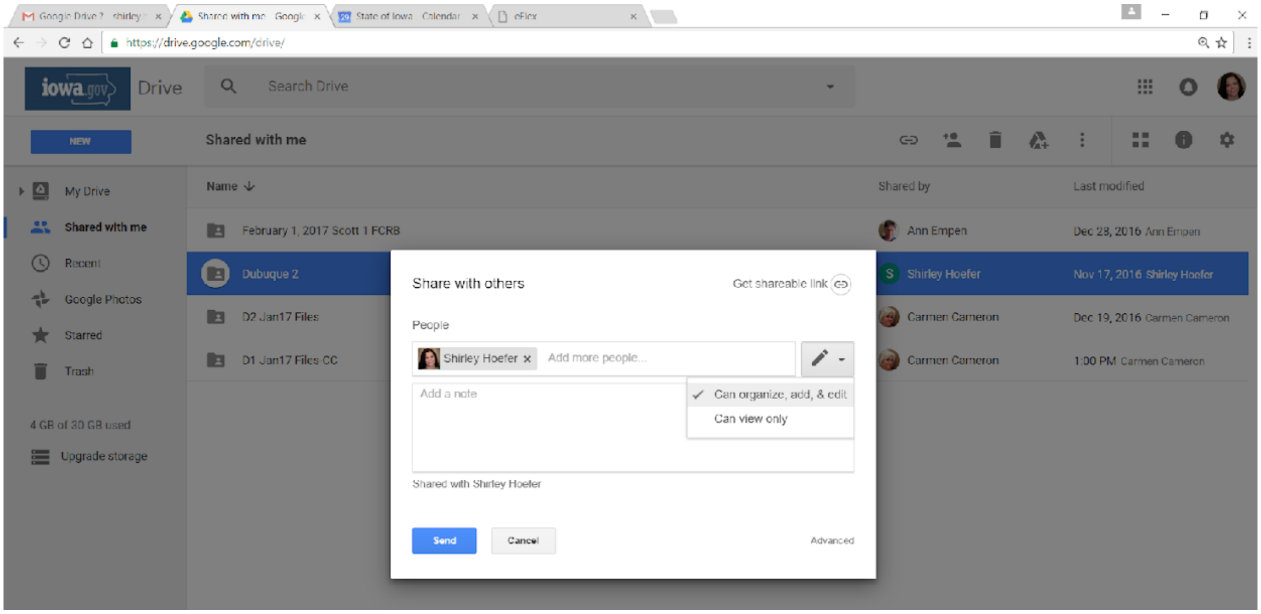
Name	Owner	Last modified	File size
2007-06-06	me	1:37 PM me	–
2007-03-04	me	1:37 PM me	–
2006-09-03	me	1:37 PM me	–

c. All documents are stored with the child's folder with no subfolders.


Google Drive ? - shirley
Jackson Myers - Google
State of Iowa - Calendar
eFlex
https://drive.google.com/drive/folders/0B-FpC9pFxyCgcFRTVVRvSWVNVjQ
iowa.gov
Drive
Search Drive
NEW
Shared with me > Dubuque 2 > Jackson Myers
My Drive
Shared with me
Recent
Google Photos
Starred
Trash
4 GB of 30 GB used
Upgrade storage

Name	Owner	Last modified	File size
2007-04-20 Order Review Hrg (Myers).pdf	Shirley Hoefer	Nov 17, 2016 Shirley Hoefer	158 KB
2007-04-13 CASA Rpt (Myers).pdf	Shirley Hoefer	Nov 17, 2016 Shirley Hoefer	610 KB
2006-10-29 Family Team Mtg (Myers).pdf	Shirley Hoefer	Nov 17, 2016 Shirley Hoefer	819 KB
2006-10-12 Order for CASA (Myers).pdf	Shirley Hoefer	Nov 17, 2016 Shirley Hoefer	128 KB
2006-10-12 CPP (Myers).pdf	Shirley Hoefer	Nov 17, 2016 Shirley Hoefer	718 KB
2006-10-03 Social History (Myers).pdf	Shirley Hoefer	Nov 17, 2016 Shirley Hoefer	334 KB
2006-08-02 Order Adjudication (Myers).pdf	Shirley Hoefer	Nov 17, 2016 Shirley Hoefer	158 KB
2006-07-16 Child Abuse Rpt (Myers).pdf	Shirley Hoefer	Nov 17, 2016 Shirley Hoefer	426 KB
2006-07-06 Order Removal Hrg (Myers).pdf	Shirley Hoefer	Nov 17, 2016 Shirley Hoefer	578 KB
2006-07-06 FSRP Rpt (Myers).pdf	Shirley Hoefer	Nov 17, 2016 Shirley Hoefer	363 KB
2006-06-28 Order for Removal (Myers).pdf	Shirley Hoefer	Nov 17, 2016 Shirley Hoefer	314 KB

6. After all the child folders are uploaded, share the folder with the facilitator. In order for the facilitator to access the last FCRB report, you will need to select “Can organize, add, & edit”.


https://drive.google.com/drive/
iowa.gov
Drive
Search Drive
NEW
Shared with me
My Drive
Shared with me
Recent
Google Photos
Starred
Trash
4 GB of 30 GB used
Upgrade storage
Share with others
Get shareable link
People
Add more people...
Add a note
Can organize, add, & edit
Can view only
Send
Cancel
Advanced

Name	Shared by	Last modified
February 1, 2017 Scott 1 FCRB	Ann Empen	Dec 28, 2016 Ann Empen
Dubuque 2	Shirley Hoefer	Nov 17, 2016 Shirley Hoefer
D2 Jan17 Files	Carmen Cameron	Dec 19, 2016 Carmen Cameron
D1 Jan17 Files CC	Carmen Cameron	1:00 PM Carmen Cameron

People: Shirley Hoefer

✓ Can organize, add, & edit

Shared with Shirley Hoefer

7. When ‘Late Mail’ is processed for the Board Members, upload the documents to the appropriate child’s late mail folder. *Note: Whenever you add documents to a shared folder, the information is automatically saved in the folder(s). Whoever the folder was shared with will have access to the newly uploaded documents whenever they access their Google Drive and open the folder(s) in their ‘Shared with me’ drive. You do not need to continually share the folder each time you add documents.*

8. Notify the facilitator via email that new information has been added to the shared folder. If additional documents are added to Google Drive folders after late mail has been sent out, notify the facilitator via email that new information has been added to the shared folder. The Facilitator Training will include information about documents being available to them whenever they go into their Google Drive shared folders so they do not need to wait for email notification from the AA in order to access the documents after the folder is initially shared.